

Sample Letters for IRA Transfers to the Chandler Education Foundation (CEF)

**Sample Request from Plan Owner to Administrator for Charitable Distribution from Individual Retirement Account to CEF**

Date:

**RE:** Request for Charitable Distribution from Individual Retirement Account

# \_\_\_\_\_ n/o \_\_\_\_\_

Dear Sir or Madame:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # \_\_\_\_\_ as provided by Sec 102(a) of the Pension Protection Act of 2006 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of \$ \_\_\_\_\_ (not to exceed \$100,000) payable to the Chandler Education Foundation, a 501(c)(3) non-profit organization (#86-0589677). Their address is:

Chandler Education Foundation  
1525 West Frye Road  
Chandler, AZ 85224  
Attention: Glenna McCollum-Cloud

In your transmittal to the Chandler Education Foundation, please give my name and address as the donor of record in connection with this transfer, and indicate that the check is for the benefit of \_\_\_\_\_ . Please copy me on your transmittal.

It is my intention to have this transfer qualify for exclusion during the 2008 tax year. Therefore, it is imperative this distribution be postmarked no later than December 31, 2008.

If you have any questions or need to contact me, I can be reached at \_\_\_\_\_ .

Thank you for your assistance in this matter.

Sincerely,

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Sample Letter from Donor Informing CEF of Forthcoming Qualified Charitable Distribution from IRA Administrator**

Date:

Chandler Education Foundation  
1525 West Frye Road  
Chandler, AZ 85224

Attention: Glenna McCollum-Cloud

Dear Mrs. McCollum-Cloud:

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account payable to the Chandler Education Foundation in the amount of \$\_\_\_\_\_ from my plan trustee/administrator, \_\_\_\_\_. Please credit the distribution amount to the following area of the Chandler Education Foundation \_\_\_\_\_, for the following purpose \_\_\_\_\_. For more information go to [www.ChandlerEdFoundation.org](http://www.ChandlerEdFoundation.org). [Note: If none is indicated, the Chandler Education Foundation Board may select an area of support.]

It is my intent to comply with the requirements of Sec. 1201(a) of the Pension Protection Act of 2006 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended (the "Code"), in connection with this gift.

Accordingly, upon your receipt of payment from my trustee/administrator, please send me a written acknowledgment that states the amount of my gift, that no goods or services were transferred to me by your organization in consideration for this gift, and that my gift to the Chandler Education Foundation is not a gift to a donor advised fund or to a supporting organization described in section 509(a)(3) of the Code.

If you have any questions or need to contact me, I can be reached at \_\_\_\_\_.

Sincerely,

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Chandler Unified School District Class Year or Year of Retirement: \_\_\_\_\_

Chandler Unified School District School Attended or Retired From: \_\_\_\_\_